With RightNow Metrics as your online survey tool, you'll never have to guess what your customers think of your products or the services you provide. Our ground-breaking survey and measurement tool is the best way to gauge your performance and continue to meet customer expectations. But before you begin using RightNow Metrics as your online survey tool, you will need to develop your survey strategy. Once this strategy is developed, you can easily create your survey, add your questions, and launch your survey using RightNow Metrics wizards. The information contained here will help you develop your survey strategy as well as create meaningful surveys for your organization.

Planning Your Survey Strategy

Web surveys not only generate a higher response rate than phone or hardcopy surveys, but also provide a way to interact with your customers and get immediate results at a much lower cost. Developing successful surveys requires a well-devised strategy. Below are some guidelines for developing your survey strategy and optimizing your survey results.

Step 1: Clearly define the survey objectives

Briefly define the purpose of the survey. State your primary objectives and goals of the survey.

Step 2: Identify the targeted participants

Identify the customers or company representatives you want to participate in your survey. For example, you may want to survey customers who have recently contacted your customer support representatives to solicit their input about their experience; or you may want to survey a targeted group to gain product-related information and feedback.

Step 3: Develop the list of questions

Develop a short list of questions that will address your primary objectives and goals. Carefully word the questions to avoid ambiguity. Also, use an appropriate response style for your questions; if you use a numeric scale as a response style, clearly define the scale for each question. Avoid using too many open-ended questions.

Step 4: Develop the survey layout

Once you have an idea of the type of questions to include in your survey, think about how to present your survey. RightNow Metrics allows you to choose from three survey layout types, including single-page, multiple-page, or branching. A single-page layout works well with surveys that contain a small number of questions. For longer surveys, you can use a multiple-page layout to break up questions over several pages. The third layout option is branching, which uses Web-based tree logic and directs the flow of questions based on the respondents' answers.

Step 5: Determine the distribution method

When considering which survey layout will work best for a particular survey, you must also decide the best way to distribute your survey. RightNow Metrics allows you to distribute your survey in an email either as a link, or a survey in HTML or ASCII text format. For more information on distribution methods, refer to "RightNow Metrics Key Terms" on this card.

Step 6: Create the survey

Surveys can easily be created through the Creating Survey wizard accessed from either the Survey Workbench or the Active Surveys console. As you begin the process of creating a survey, you will want to have a general understanding of RightNow Metrics key terms. Refer to "RightNow Metrics Keys Terms" on this card to assist you in creating your survey.

Step 7: Test the survey

One of the key elements to creating a successful survey is to test the survey. Before you send it to your targeted audience, you will want to send it to other staff members or post the survey on your Web site. The best way to make sure you have asked all the questions needed to complete your goals and objectives is to send the survey internally to staff members. Once surveys are completed, you will also want to test the results.

Step 8: Launch the survey

The optimal time to launch a survey is Monday evening. Since most people respond within a day, the best response occurs when surveys are launched the beginning of the week. Avoid sending surveys on Friday, Saturday, or Sunday. Initiate the survey from a high-ranking company representative or an email with a brand identification.

Step 9: Analyze the results

You can instantly analyze your results using the Results feature in RightNow Metrics. You can display your results in graphical or tabular format, or export your results into other applications for further analysis.

Key Terms

Before you begin the process of creating a survey, you will want to become familiar with RightNow Metrics terminology.

RightNow Metrics Wizards:

Creating Survey wizard—An interactive utility for creating a survey; the starting point in the creating survey process.

Creating Question wizard—An interactive utility for creating questions.

Creating Library wizard—An interactive utility for creating libraries for organizing and storing questions.

Launching Survey wizard—An interactive utility for defining survey settings, including type of survey, distribution method, and when the survey will be sent.

Survey Types:

Closed-Incident survey—A survey that is automatically emailed to your customers after the questions they submit have been answered and their incidents have been solved by a customer service representative. Closed-Incident surveys can be used when RightNow Metrics is integrated with RightNow eService Center or another customer relationship management package. This type of survey enables you to get automatic customer feedback and then instantly tabulate and display the results. Several different Closed-Incident surveys can be defined and sent depending on incident-specific parameters.

On-Demand survey—A survey for measuring customer satisfaction, opinions, product intelligence, or any other area of interest. You can create On-Demand surveys for RightNow Metrics installed in either standalone mode or as an add-on module to RightNow eService Center. On-Demand surveys can be part of your Web site or emailed to your customers.

Distribution Methods:

Email Link—This method contains a link to a survey displayed on a Web page.

Email HTML—This method distributes your survey in an email to your customers and contains both an ASCII text URL to the survey and a Web version of the survey. If the customer's email client is capable of displaying HTML, the customer will see the survey. If the customer's email client does not support this functionality, the customer will see the ASCII text URL.

Email—Surveys distributed as email are sent to participants as ASCII text. Respondents do not need a Web browser to answer email surveys; they simply reply to the email by entering the number of their choice or short answer in the space below the question and options.

Survey Tracking:

Targeted—In targeted tracking, an On-Demand survey is distributed as an email link or email HTML and only those persons who were specifically sent the survey are allowed to respond. The email addresses are placed in the database, and you can view a list of the email addresses for those who responded to the survey.

Anonymous—In anonymous tracking, an On-Demand survey is distributed as an email link or email HTML and the email addresses of the respondents are not necessary for them to respond to the survey; therefore, the list of respondents' email addresses is not stored in the database.

Question Types:

Check All—A question that has a number of specified answer choices in which the respondent can check all answers that apply.

Multiple Choice—A question that has specified answer choices in which the respondent can choose only one.

Range—A question that has a specified numerical range of answer choices. Range questions commonly pertain to rating product satisfaction or the performance of a customer service representative.

Short Answer—A question without any specified answer choices in which respondents answer in their own words.

Space—A formatting feature for adding extra lines between survey questions.

Text—A formatting feature for adding text or graphics between survey questions. You can use a text block to add instructions for upcoming questions or to add design features to enhance your surveys.

Survey Layout Types:

Single-Page—A layout type for surveys distributed by email in which all questions are on one page.

Multiple-Page—A layout type that contains more than one page. Multiple-page surveys contain one line of questions and can be effective in breaking up large surveys.

Branching—A layout type that directs the flow of questions based on the responses chosen by survey participants. Incorporating Web-based tree logic, this layout type allows you to create branches and pages that include more than one line or branch of questions. You can create branches for range and multiple choice questions.